

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE		PAGE OF PAGES	
						1 19	
2. AMENDMENT/MODIFICATION NO.		3. EFFECTIVE DATE		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO. (If applicable)	
P00006		See Block 16C		PR-OMS-20-01365			
6. ISSUED BY		CODE		7. ADMINISTERED BY (If other than Item 6)		CODE	
ITAD							
US Environmental Protection Agency 109 T.W. Alexander Drive Mail Code: AA005 Research Triangle Park NC 27709							
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)				(x)			
GRANT THORNTON L.L.P. Attn: SHEILA WRIGHT 333 JOHN CARLYLE ST. SUITE 500 ALEXANDRIA VA 22314							
				9A. AMENDMENT OF SOLICITATION NO.			
				9B. DATED (SEE ITEM 11)			
				x			
				10A. MODIFICATION OF CONTRACT/ORDER NO.			
				EP-W-17-019			
				68HERD20F0102			
				10B. DATED (SEE ITEM 13)			
				05/15/2020			
CODE 128159105		FACILITY CODE					
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS							
<input type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended. <input type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or electronic communication which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or electronic communication, provided each letter or electronic communication makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.							
12. ACCOUNTING AND APPROPRIATION DATA (If required)							
See Schedule							
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.						
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).						
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:						
	D. OTHER (Specify type of modification and authority)						
X	FAR 43.103(a) (3) Mutual Agreement of the Parties						
E. IMPORTANT: Contractor <input type="checkbox"/> is not <input checked="" type="checkbox"/> is required to sign this document and return <u>1</u> copies to the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)							
DUNS Number: 128159105							
TOCOR: Felicia Tarver InvoiceApprover: Felicia Tarver							
The purpose of this modification is the following:							
1. Change and revise the PWS (see Attachment No. 1) to de-scope some services identified by redline/strike-out in the attached PWS for the Base Period and Option Period 1 Periods of Performance. These reductions reflect a decrease of \$-443,469.20 for the Base Period, and \$-420,533.05 for the Option Period 1; therefore, an overall decrease of \$-864,002.25 for both Periods of Performance.							
2. Decrease the Base Period not-to-exceed ceiling by \$443,469.20 from \$1,794,960.72 to Continued ...							
Except as provided herein, all terms and conditions of the document referenced in Item 9 A or 10A, as heretofore changed, remains unchanged and in full force and effect.							
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
				Darren J. Gann			
15B. CONTRACTOR/OFFEROR		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA		16C. DATE SIGNED	
				 (Signature of Contracting Officer)		ELECTRONIC SIGNATURE 02/11/2021	
(Signature of person authorized to sign)							

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED
EP-W-17-019/68HERD20F0102/P00006PAGE OF
2 19NAME OF OFFEROR OR CONTRACTOR
GRANT THORNTON L.L.P.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>\$1,351,491.52.</p> <p>3. Decrease the Option Period 1 not-to-exceed ceiling by \$420,533.05 from \$1,830,672.82 to \$1,410,139.77.</p> <p>4. Decrease the total task order not-to-exceed ceiling by \$864,002.25 from \$3,625,633.54 to \$2,761,631.29.</p> <p>5. All other terms and conditions remain unchanged and in full force and effect.</p> <p>LIST OF CHANGES: Reason for Modification: Supplemental Agreement for work within scope Total Amount for this Modification: -\$864,002.25 New Total Amount for this Version: \$2,761,631.29 New Total Amount for this Award: \$2,761,631.29</p> <p>CHANGES FOR LINE ITEM NUMBER: 1 Total Amount changed from \$1,794,960.72 to \$1,351,491.52</p> <p>CHANGES FOR LINE ITEM NUMBER: 2 Total Amount changed from \$1,830,672.82 to \$1,410,139.77</p> <p>Payment: RTP Finance Center US Environmental Protection Agency RTP-Finance Center (AA216-01) 109 TW Alexander Drive www2.epa.gov/financial/contracts Durham NC 27711 Period of Performance: 05/15/2020 to 05/14/2021</p>				

ATTACHMENT 1

Request for Task Order Proposal (RFTOP)

OFFICE OF CUSTOMER ADVOCACY COMMUNICATIONS, POLICY AND PORTFOLIO MANAGEMENT (OCAPPM)

Revised – January 25, 2021

Acquisition Title: Customer Experience and Communications Support Task Order

(X) ITS-BISS 3 FA1

1. PERFORMANCE WORK STATEMENT (PWS)

1.1. Background and Purpose

*The Office of Customer Advocacy, Policy and Portfolio Management (OCAPPM) is the lead organization for customer experience, customer adoption, and communications. The office also manages the agency's IT training, information directives, and information portfolio while providing leadership and support to the CIO and agency information governance organizations.

*Customer Experience (CX) is an increasing focus in both public and private industry. CX expands upon the concepts of customer service to move from distinct points of provider-consumer interaction to the wholistic view of the entire process of service provision, from initiation to completion. In 2016 OCAPPM launched a CX program for the Office of Environmental Information (OEI) of the EPA; at the time OEI was undergoing a reorganization to streamline the office. The program was focused on the IT/IM services that OEI provided. OEI interviewed customers in the lead up to the reorganization and found strong evidence that many customers felt that OEI was not providing a good customer experience. Customers cited a lack of information, customer input in purchasing and developing IT/IM solutions, support, and lack in resolving existing complaints in a timely manner. As a result, OEI charged OCAPPM with developing a customer experience program that focused internally on EPA Staff IT/IM experiences.

*Since the OEI Reorganization, the EPA has merged OEI and the Office of Administration and Resource Management (OARM) into a single office known as the Office of Mission Support (OMS). As such, the CX program needs to expand to cover all OMS services, such as Acquisitions, Facilities, Grants, Human Resources and IT/IM. The CX program also needs to take stock of its current functions and determine whether they are effective in improving the experience of our customers. Are there things the program is doing that aren't impactful or necessary? Are there things the CX program isn't doing that would be impactful? The CX program has been highly tactical and now needs a cohesive overall strategy to combine the various activities under one direction, to assess strengths and weaknesses, and to expand the program to OMS.

The CX Program is also experiencing increasing demands on it for leadership and support from across the Agency, and even from outside the Agency. Agency leadership, especially leadership within OMS, have charged the program with driving change in OMS and EPA. Specifically, how

can the CX program improve OMS' products and services? What processes, data, systems and other investments need to be put into place to do that? What is the short, medium, and longer-term growth strategy for the CX program? How does the CX program translate that longer-term vision into a day by day, week by week, month by month set of activities to achieve the vision?

*Please be advised that all references to IT in this PWS is for advisory assistance only. The ITSBISS3 contract is not an IT contract and cannot do any services that would require FITARA.

1.2 PWS OBJECTIVES

The purpose of this acquisition is to acquire the necessary and experience contract resources to perform all tasks under this proposed RFTOP. Customer Experience is a new Program; however, it is the expectations of OCAPPM/CX to achieve all contract objectives, evolve CX services and to expand CX services/support throughout EPA. The CX Program requires a key resource to have the required skills, capabilities and viable work experience to manage, monitor and track all facets of contract activity and to ensure all TO objectives are accomplished and achieved. The objectives to be achieved are:

1. Task Order Program and Project Management Support

1.1. Task Order Program Management Plan (TOPMP)

1.2. Meetings

1.3. Reporting

2. OCAPPM Customer Experience Strategy and Implementation Management

2.1. Implementation of a strategic plan or vision

3. Communications, Outreach Guidance and Support

3.1. Communications Development

3.2. Presentations and Training

3.3. Optional Sub-Task 3.3 OMS Employee Portal Analysis

3.4. Optional Sub-Task 3.4 Customer Relationship Management (CRM) Tool

4. Transition

1.3 SCOPE OF WORK (Reference Base FA1 Contract language 4.0 Requirements)

The scope of this proposed Task Order (TO) is to provide Program/Project Management Strategic and Implementation Support for OCAPPM's Customer Experience, Communications, Customer Adoption/Change Management Programs.

1.4 TASKS REQUIREMENTS (REFERENCE 4.0 BASE CONTRACT)

TASK 1: Task Order Program and Project Management Support (Reference ITS BISS 3, FA1 base contract, Integrated Program Support)

Program Management (SEVERABLE)

The Contractor shall furnish the necessary personnel, material, equipment, services and facilities (except as otherwise specified) to perform the requirements of the contract and TO PWSs. The Contractor shall be responsible for training contract personnel, as necessary, to perform the requirements as appropriate.

The Contractor shall provide this training at no direct cost to the government. Except for the information and reporting requirements outlined in ITS BISS III PWS, “Section 3.3”: Enterprise and Cross-Program Coordination, and “Section 3.4”: Task Order Performance Reviews, the Contractor shall perform work under this contract only as directed under TOs.

The Contractor shall provide Task Order Program and Project Management Support, including but not limited to the following:

Sub-Task 1.1: Task Order Program Management Plan (TOPMP) (Reference Base Contract 4.2 Planning). (NON-SEVERABLE)

The Contractor shall create a viable program management plan within 15 business days after award of the TO. The TOPMP shall meet Agency Requirements as described in the respective task/subtasks for demonstrating the contractor’s understanding to the government’s expectations, confirming the contractor’s abilities to perform, confirming required skills, and leveraging resources to the appropriate work activities. The Contractors Project Manager is required to maintain and track all contract resource schedules, hours, work activity, performance information as well as track and monitor all TO financial reports and project objectives and cost as appropriate.

Sub-Task 1.2: Meetings (Reference base contract 4.11, Conference and Meeting Support) (SEVERABLE)

The Contractor is responsible for attending regularly schedule meetings as described in this RFTOP and other professional meetings, ad-hoc meetings or CX events as directed by the TOCOR. The contractor may be required to record and distribute meeting notes as appropriate.

The Contractor shall provide and support CX Senior Leadership discussions and be required to attend meetings as well as assist OMS’ Chief Customer Experience Officer and EPA SMEs with management and planning efforts.

The Contractor shall demonstrate superior management skills/expertise and best practices pursuant to the TO objectives and confirmed by the EPA TOCOR described (*but not limited*) to the following examples:

- a. Facilitate meetings to assist the management team with organization, development, and goals pertaining to CX.
- b. Provide facilitation and assistance for meetings, which may include developing agendas, creating comparison materials, and other related documents. This activity does not include securing meeting space.

Sub-Task 1.3: Reporting (Reference section F.3 1552-211-72) Monthly Progress Reporting)
(SEVERABLE)

The Contractor shall provide support but not limited to, the following:

Reports shall be written according to the respective RFTOP or as described within each task/subtasks or designated by the TOCOR.

Task 1: Deliverables & Acceptance

- **Deliverables:**

Type of Deliverable	Schedule of Deliverables
Monthly Invoice	Submitted once a month, reporting structure to be provided via technical direction from the TOCOR
Monthly Performance Report	Submitted once a month, reporting structure to be provided via technical direction from the TOCOR
Estimate-At-Completion (EAC) Financial Report	Submitted once a month along with all other financial and performance reports. Reporting structure to be provided via technical direction from the TOCOR

- **Evaluation Criteria:** All deliverables are to be accessible, clear, concise, and quality assured for accuracy and delivered to the EPA TOCOR as requested.
- **Acceptance Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR

TASK 2: OCAPPM Customer Experience Strategy and Implementation Management (Reference Base Contract 4.9 Customer Relations Management and 4.10 Studies, Analysis and Program Support)

Under this task, the contractor shall utilize deep CX and Customer Insights, backgrounds, research-based consulting and effective meeting management tools to provide advice and assistance services in CX maturity and measurements. Specifically, the CX Program is seeking support in the following general areas:

Sub-Task 2.1: Implementation of a strategic plan or vision that grows the CX Program at EPA over the next three years. This plan should also identify work products and projects quarter by quarter for execution that will produce the desired strategic results. (NON-SEVERABLE)

- a. Identify and cultivate data sources and uses that the CX program should use to develop solid, objective, and numbers-driven examples of driving positive change in the delivery of services and support provided by OMS.
- b. Develop and execute case studies or use cases that demonstrate how Customer Experience at EPA drives positive change and delivers quantifiable efficiencies, savings, or programmatic results.
- c. Conduct communications, outreach and training to other parts of the Agency to enroll them in CX programs and projects and educate them about the benefits of CX.
- d. Analyze programmatic, financial, communications, and other data to look for opportunities where CX can make a difference.
- e. Work with Federal staff to help them develop a set of requirements for a Customer Relationship Management (CRM) System for use across EPA programs offices and regions.
- f. Execute a cross-office collaborative project in concert with federal staff to achieve success against a common CX problem or issue shared by many program offices or regions across the Agency.
- g. Provide Agency Wide CX support i.e., conduct research , prepare CX strategies and assist in implementing those strategies as appropriate (e.g., implement CX services to all EPA programs and region upon request.

2.1: Deliverables & Acceptance

- **Deliverables:**

- CX Strategic Implementation Support
- CX Findings and Determination Report for Implementing CX Agency Wide
- **Evaluation Criteria:** All deliverables are to be accessible, clear, concise, and quality assured for accuracy and delivered to the EPA TOCOR as requested.
- **Acceptance Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR.

TASK 3: Communications, Outreach Guidance and Support (Reference Base Contract 4.11 Communications Support)

Outreach Guidance and Support (SEVERABLE)

The contractor shall assess and identify the various types of communications that should be standard communications as well as identify existing types of communications going out from OCAPPM/CACD to the customer and determine how that communications can be improved to provide or guarantee a productive positive experiences and outcomes for the customer. The assessment is to provide a findings and determinations (F&D) based on facts. The F&Ds must confirm the contractor's approach/recommendations to improve the communications. The results are to be reviewed and approved by the TOCOR.

Sub-Task 3.1: Communications Development (NON-SEVERABLE)

- a. The contractor shall meet with EPA project teams to gather critical information about projects and develop communications plans to support the roll-out of new technologies, procedures, training, and initiatives. Communications plans will include a strategy that includes all pieces of key information for communicating information to stakeholders. Communications strategies will also include a timeline for when communications will be distributed to various stakeholder groups.
- b. Quick Reference Guides, FAQs, Fact Sheets, Posters and Other Communications Products —Develop communications products to communicate key information to Agency stakeholders, across a variety of channels (e.g., email, Web, digital and physical posters). The contractor is not required to develop the platform but assist EPA with efforts relative to planning out the social media platform). This requirement does not require or to include any service or action covered under FITARA.
- c. Web and SharePoint Content —Support the development of Web content for a new OMS Communications intranet site and create or review Web and SharePoint content for project sites so customers can consume information.
- d. Talking Points and Briefing Presentations —Develop talking points and briefings to keep OMS senior leaders informed of project progress and other key information.

c. **Technical Editing**—Review draft products created by OCAPPM and OMS line offices for OMS customers about EPA style, grammar, plain language and accessibility. As part of the fulfillment of these duties, the contractor shall:

- Meet regularly with OMS project teams via the TOCOR and interview stakeholders to gather information necessary for drafting communications products.
- Gather and respond to customer feedback to continuously improve upon communications products and initiatives.
- Think strategically and proactively to encompass a holistic approach to OMS communications that are clear, concise, compelling and include a “call to action” for end users.
- Ensure communications products adhere to the EPA Style Guide, utilize Agency templates, meet Section 508 requirements and follow the communication product review process as necessary.

Sub-Task 3.2: Presentations and Training (Reference base contract 4.12 Training, Conference and Meeting Support) (NON-SEVERABLE)

All presentations, briefings, training sessions, demonstrations, and educational programs regarding information products, services and databases shall be organized, set up, and conducted per Agency guidelines. All corresponding materials shall be created and facilitated in accordance with the contract and/or program policies governing media, or as directed and approved by the TOCOR.

- a. The Contractor shall develop briefings, outreach sessions, and educational programs to instruct customers in the use and availability of information products and services.
- b. The Contractor shall participate in, set up, and conduct demonstrations of EPA’s information products, services, and databases for a broad array of customers. Demonstrations may be held at professional conferences, via webinar, or at local sites. Any materials prepared must be in accordance with EPA’s regulations and policies governing that medium and format.
- c. The Contractor shall develop and offer training in accordance to the scope of the PWS or as directed by the TOCOR. The Contractor shall work with EPA staff to reserve EPA training areas or equipment as necessary. The Contractor shall provide relevant training materials for participants.

Task 3: Deliverables & Acceptance:

- **Deliverables:** Training Materials/Presentations
- **Evaluation Criteria:** All deliverables are to be accessible, clear, concise, and quality assured for accuracy and delivered to the EPA TOCOR as requested.

- **Acceptance Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR.

Optional Sub-Task 3.3: OMS Employee Portal Analysis (Reference 4.9 Customer Relationship Management and 4.12 Systems Analysis and 2.0 Task within the PWS). (SEVERABLE)

OMS will enable EPA programs and regions to focus on their core mission because OMS will make the services employees need to get the job done easy, effective and customer-focused. To do that, OMS will launch an employee portal for EPA employees.

This portal will use customer experience and change management as well as the agency's LEAN/KAIZEN programs to offer an employee-centric system of engagement that integrates with other applications, streamline processes, and provide data sources across OMS to get EPA employees the OMS services they need with a single request. The portal will require the use of a (employee focused) CRM/Workflow tool.

The introductory service will be the FITARA Acquisition Review workflow – by starting with a small audience of customers, something OCAPPM controls, (practice on family) we want to demonstrate great utility/Customer Experience (CX) for a limited number of people in the agency. At the same time, the portal will provide OMS staff and managers a rich trove of data to mine that will help identify further efficiencies and opportunities for consolidation. By providing a “onestop shop” for employee administrative services, OMS not only empower the employee with the information or services they need, it offers senior leadership consistent and standardized data to propel agency strategies and prioritize resources. The contractor shall not include any service or action covered under FITARA. The employee portal (the actual tool) will not be developed under the proposed TO.

Optional Sub-Task 3.3.1: Customer Experience Tools and Methodologies as a Service

- a. The Contractor shall provide/offer the following services; prepare and plan methodologies, facilitate customer persona and journey mapping workshops to finalize customer requirements, needs and pain points for OMS employee portal.

Optional Sub-Task 3.3: Deliverables & Acceptance

- **Deliverables:** CX Persona Development and Journey Mapping Workshop as directed by the TOCORS
- **Evaluation Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR.

- **Acceptance Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR.

Optional Sub-Task 3.4: Customer Relationship Management (CRM) Tool (Reference 4.9 Customer Relationship Management) (SEVERABLE)

The Contractor shall provide a broad range of technical and professional services to support EPA's customer relationship management function and operations at all levels of the organization. This support may include but is not limited to providing advice and assistance to OMS/EI/CX and other EPA offices to support the planning, analysis, design, development, implementation, and management of programmatic services and support. It may also include performing customer, market, and emerging issues research, including providing timely advice on customer personas, needs, pain points and moments that matter, as well as providing research and recommendations on the best practices for reaching and communicating with customers and stakeholders with data and information.

*Within OMS, EI provides Information Technology/Management (IT/IM) services and support to customers across EPA through its portfolio of IT/IM contracts for program management and compliance support; systems development; data center operations; and computer desktop provisioning services. EPA may require support for implementing customer relationship management in support of the services offered through these vehicles.

Please be advised that all reference to information technology (IT) in this PWS is for advisory assistance only. The ITSBISS3 contract is not an IT contract and cannot do any services that would require FITARA.

Optional Sub-Task 3.4: Deliverables & Acceptance

- **Deliverables:** Findings, determinations and/or recommendations TBD upon option exercise.
- **Evaluation Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered TBD to the EPA TOCOR upon option exercise.
- **Acceptance Criteria:** All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR.

TASK 4: Transition (Reference 2.0 Base Contract "Objectives") (NON SEVERABLE)

The contractor shall prepare and execute a plan to transfer all historic, data, work, business and technical documentation, identify software from the incumbent contractor to the succeeding government entity or contractor within Sixty (60) days of the awarded contract period. The contractor is to provide and/or support the following task objectives:

- a. ~~The Contractor shall submit a phase out plan to the TOCOR at the beginning of the transition period or as directed by the TOCOR. Any reviews to the plan requested by the TOCOR shall be made within Ten (10) business days.~~
- b. ~~The Contractor shall include a schedule for transfer of work, documentation from the incumbent contractor to the succeeding government entity or contractor if applicable.~~
- c. ~~The Contractor shall transfer all business and technical documentation as appropriate to the TOCOR.~~
- d. ~~The Contractor shall disposition contractor purchased government owned assets, including but not limited to, equipment, furniture, phones, and computers if applicable.~~
- e. ~~The Contractor shall transfer all Government Furnished Equipment (GFE) and Government Furnished Information (GFI) per the direction of the TOCOR. As well as assist in GFE management, assistance and if applicable.~~
- f. ~~The Contractor shall turn over all government keys, ID/Building Access cards and security codes if applicable.~~
- g. ~~The Contractor shall ensure that no significant disruptions to user services and support occur during the transition period.~~
- h. ~~The Contractor shall meet with the TOCOR within the last five (5) business days of the transition period to provide a transition status of all relevant contract activities relevant to transition and contract performance.~~

Task 4: Deliverables & Acceptance

- **Transition Deliverables:** ~~Transition Phase In/Out and/or a Combination of both Plans. Within Ten (10) Business days upon award of this TO.~~
- **Evaluation Criteria:** ~~All deliverables are to be accessible, clear, concise, quality assured for accuracy, and delivered as requested by the EPA TOCOR.~~
- **Acceptance Criteria:** ~~All deliverables are to be accessible, clear, concise, quality assured for accuracy and delivered as requested by the EPA TOCOR.~~

Other Additional Proposal Information

This section provides additional information on task order management such as on-site contractor support, government furnished property, period of performance, and contract type/pricing structure, i.e., firm-fixed or time and materials /labor hour for this task order.

Management Controls (Reference Base Contract Task 4.1 Integrated Program Support)

The following management controls are intended to ensure that Agency officials remain accountable, retain control over the Contractor's final work product as well as ensure the Contractor's services do not place EPA in a vulnerable position. The TOCOR is responsible for assuring the contractor complies to all terms and conditions of the TO as follows:

- Work may or may not be off-site, depending on named organizations, service and/or product.
- The TOCOR will monitor the deliverable schedule and review the deliverables to ensure that the content and quality are responsive to the requirements of the TORFP. Under this TO, the TOCOR may not provide technical direction to the Contractor which would affect the overall scope of the TO or price without consulting with the contract COR (if applicable) and CO.
- Technical communications are permitted between the TOCOR. Clarification to deliverables will be requested through technical direction as appropriate.
- The Contractor shall submit all deliverables and documents for publication to the TOCOR prior to public release, if applicable.
- Contractors shall clearly identify themselves as an EPA contractor when acting in fulfillment of this TO. While working onsite or meeting with federal employees, contractors shall wear or display government issued identification designating them as such. Contractors shall be excluded from sensitive Agency discussions related to policy, enforcement, legal matters, and procurements.
- EPA shall be mentioned as the funding source in publication and other distributed final work products that arise from this contract TO.

ACCEPTABLE QUALITY LEVEL FOR TASKS

See Attachment 1: Quality Assurance Surveillance Plan

METHOD OF SURVEILLANCE

Reports prepared by the contractor undergo a secondary review process as appropriate by the EPA Stakeholders and/or EPA SMEs as appropriate. Each report has a designated EPA reviewer. The EPA reviewer conducts a detailed review of the contractor's summary of relevant data and examines the conclusions drawn by the contractor in accordance with the criteria described in the task Order. Once the EPA reviewer has finalized the data evaluation in the form of an Agency review, the report may be used officially. The EPA reviewer will complete an EPA Reviewer's

Assessment Form that notes discrepancies, omissions, inaccuracies and/or inappropriate data evaluations (“errors”).

The TOCOR or Contract Level COR will calculate, quarterly, the average number of reports containing substantive technical, guideline, or format errors. The CORs will compare agency due dates or approved revised due dates to completed date of reports, quarterly and calculate the percentage of late reports.

PERIOD OF PERFORMANCE

The period of performance of this task order:

- Base Period: Twelve (12) months from award
- Option Period 1: Twelve (12) from option exercise

TASK ORDER TYPE

- The Government anticipates a Hybrid TO award consisting of Fixed Price and Time & Materials.

INSPECTION AND ACCEPTANCE

The TOCOR in consultation with the appropriate government Subject Matter Experts will review deliverables for technical content, accessibility, completeness, and accuracy. Final inspection, testing and acceptance of all reports and other deliverables will be approved by the TOCOR.

QUALITY ASSURANCE PROJECT PLAN

The Contractor shall submit the following quality system documentation to the CO at the time frames identified below:

	Documentation	Specifications	Due
X	Quality Assurance Project Plan for the Task Order	EPA Requirements for Quality Assurance Project Plans (QA/R-5) (dated 03/20/11)	Two (2) weeks after award

This documentation can be found on the following EPA website –

<https://www.epa.gov/quality/epa-qar-5-epa-requirements-quality-assurance-project-plans>

This documentation will be prepared in accordance with the specifications identified above or equivalent specifications defined by EPA.

The Government will review and return the quality documentation, with comments, and indicating approval or disapproval. If necessary, the contractor shall revise the documentation to address all comments and shall submit the revised documentation to the government for approval.

The Contractor shall not commence work involving environmental data generation or use until the Government has approved the quality documentation.

TASK ORDER ADMINISTRATION DATA

Contract Administration Representatives

- Contracting Officer: Darren Gann, gann.darren@epa.gov
- Contract Level Contracting Officer's Representative: Kim Farmer, farmer.kim@epa.gov
- Task Order Contracting Officer's Representative: Holly Fenderson, fenderson.holly@epa.gov
- Alternate Task Order Contracting Officer's Representative : Felica Tavers, tavers.felica@epa.gov

INVOICING

Invoices shall be submitted in accordance with the contract under which this task order is awarded through FedConnect to the CO, CS, and TOCOR. Invoices shall be submitted electronically to: US EPA FINANCE OFFICE AT DDC-KINVOICES@EPA.GOV

For format and guidance refer to: http://www2.epa.gov/financial/contracts#Contract_invoices The customer service contact information for the finance office is contractpaymentinfo@epa.gov and 919-541-1148.

TASK ORDER CLAUSES (*WILL DEPEND ON IF THERE OPTIONS OR OPTIONAL TASKS*)

FAR 52.217-7 Option for Increased Quantity -- Separately Priced Line Item (Mar 1989)

The Government may require the delivery of the numbered line item, identified in the Schedule as an option item (service), at the price stated in the Schedule. The Contracting Officer may exercise the option by written notice to the Contractor within *14 calendar days*. Delivery of added items (services) shall continue at the same rate that like items are called for under the contract, unless the parties otherwise agree.

(End of Clause)

FAR 52.217-9 Option to Extend the Term of the Contract (Mar 2000)

(a) The Government may extend the term of this contract by written notice to the Contractor within 5 calendar days before the expiration of this contract; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 30 days before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 60 months.

(End of clause)

EPAAR 1552.237-72 Key personnel. (APR 1984)

(a) The Contractor shall assign to this contract the following key personnel:

• Program Manager

EPA-J-52-101 LIST OF ATTACHMENTS

Attachment 1: QUALITY ASSURANCE SURVEILLANCE PLAN

INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS

Questions

Questions must be submitted five (5) days after issuance of RFTOP.

Protests

No protest under FAR 33.1 is authorized, except for (1) a protest on the grounds that the order increases the scope, period, or maximum value of the contract, or (2) protests in excess of \$10 million may only be filed with the Government Accountability Office (GAO) pursuant to FAR 33.104. Refer to FAR 16.50.5.

EPA-L-36-101 RFTOP Proposal Instructions

(a) Technical & Pricing Proposals shall be separate documents; however, the offeror's response shall not exceed 25 individual written pages total for the Technical & Pricing Proposal combined (*they may be printed double-sided but not exceed the individual page limit*). However, this limitation does not include resumes, charts, figures, or illustrations.

(b) **Technical proposal instructions –**

(1) The technical proposal shall be complete and demonstrate an understanding of the work to be provided and the contractor's ability to perform the work in accordance with PWS. The technical proposal shall address all the technical evaluation criteria presented in this section.

(2) Each section of the proposal shall be titled.

(3) Subcontractors

Each offeror shall list in a table format the name and addresses of all subcontractors who will perform work or labor or render services to the offeror for compensation in an amount in excess of one percent of the offeror's total price. Each offeror shall show on the table the portion of the work to be done by each subcontractor. This table shall be included with the technical proposal. The table shall include: (a) the name and location of the subcontractor, (b) a short description of the work the subcontractor will be designated to perform or deliver, (c) the portion in percent of the work the subcontractor will be designated to perform or deliver.

(4) Conflict of Interest

Vendors shall provide a completed version of the certification at EPAAR 1552.20972 Organizational Conflict of Interest Certification (APR 1984) as part of its Technical Proposal. The complete certification will not count against the page limitations for the Technical Proposal.

Consistent with the terms of the prime contract, vendors shall disclose any actual or potential conflict of interest to the Contracting Officer as early as possible and prior to submission of any proposal. The disclosure shall include a description of actions which the Contractor has taken or proposes to take, after consultation with the Contracting Officer, to avoid, mitigate, or neutralize the actual or potential conflict of interest. Upon receipt of the information, the Contracting Officer shall make a final decision within three (3) business days.

For the purposes of this RFTORP, EPA does not believe there is or will be a potential conflict of interest under this TO. However, the final determination is to be made by the EPA Procurement Officer.

(c) Technical Evaluation Criteria

(1) FACTOR: Technical Capability: The contractor shall propose a Technical Approach that can substantiate the contractor's resources abilities, skills and experience in accomplishing the objectives and confirm the contractor's understanding and knowledge to each of the specific task/sub-tasks outcomes to be achieve as appropriate.

Sub-Factor 1: Management Approach: The contractor shall describe its Management Approach in the form of the contractors of the Task Order Management Plan. At a minimum, the TOMP (OR MP) shall address the planning, implementation, reporting (including funding burn rates), TOCOR communications, and team management elements of managing the task/subtasks over the life of the TO. The MP shall include the approach for reporting status of all milestones and deliverables and

provide proposed performance measures and a Quality Assurance Plan for monitoring, tracking and managing all resources and tasks under this TO.

Sub Factor 2: Staffing Approach: The offeror shall submit a Staffing Plan which illustrates its understanding of the requirement, as well as availability of key and nonkey contract resources to contribute to accomplishing the requirement. The contractors staffing plan shall outline the key and non-key contractor personnel to be assigned to perform this tasks/sub-tasks. The information shall include present employment status, proportion of time available for this task order as well as the nature and extent of commitment to other projects. For key personnel, the offeror shall disclose the ability to replace individuals with equally qualified personnel if the key personnel need to be replaced. If personnel are not presently employed by the company, include letters of intent. The offeror shall specifically address the expertise and experience of proposed individuals (both key and non-key personnel) for conducting the task identified in the tasks/sub-tasks in the task order.

The technical factors above will be evaluated using rating scale below.

Technical Ratings & Descriptions	
Rating	Description
Acceptable	Proposal clearly meets the minimum requirements of the solicitation.
Unacceptable	Proposal does not clearly meet the requirements of the solicitation.

(d) Task order evaluation (check one): X

Best Value with Tradeoffs

___ Lowest Price Technically Acceptable

(e) Price Proposal

Pricing will be evaluated based upon the above and in accordance with the Base Contract.

ATTACHMENT 1

QUALITY ASSURANCE SURVEILLANCE PLAN

PERFORMANCE REQUIREMENT	PERFORMANCE MEASURE (PM)	PERFORMANCE STANDARD	SURVEILLANCE METHOD	INCENTIVES & DISINCENTIVES
<p><u>MANAGEMENT AND COMMUNICATION:</u></p> <p>The contractor shall maintain contact with the EPA CO, COR, and TOCOR throughout the performance of the contract. In addition, the contractor's performance will also be evaluated against the tasks/sub-tasks criteria as indicated with the each of the tasks/sub-tasks as appropriate.</p>	<p>Contractor shall immediately bring potential problems to the appropriate EPA personnel and shall recommend actions that would mitigate or resolve the problem.</p>	<p>Issues that impact project schedules and costs shall be brought to the attention of the EPA within 3-days of occurrence.</p>	<p>All active task orders will be reviewed by the EPA to identify unreported issues.</p>	<p>Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation of Business Relations in the Contractor Performance Assessment Reporting System (CPARS).</p>
<p><u>TIMELINESS:</u></p> <p>For every Task Order awarded establishing a firm, specific delivery date for the generation of a report, the contractor shall deliver such report to the COR, TOCOR and CO no later than the time specified in the order's PWS.</p>	<p>Deliverables and related work must comply with contractual timeliness requirements. The contractor will be evaluated on its responsiveness to all task orders.</p>	<p>95% of all deliverables and related work shall be completed on time within task schedule and/or tech. direction requirements.</p>	<p>100% inspection of all deliverables and related work by the TOCOR; TOCOR will document the timeliness of all work requirements.</p>	<p>Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation of Timeliness in the Contractor Performance Assessment Reporting System (CPARS).</p>
<p><u>TECHNICAL QUALITY:</u></p> <p>For every task order awarded, the analyses conducted by the contractor shall be factual, defensible, credible, and based on sound CX methods. All data shall be collected from reputable sources and quality assurance measures shall be conducted in accordance with the agency requirements outlined in the task orders.</p>	<p>All deliverables and related work must be complete, accurate, thorough, and professionally credible.</p>	<p>Data are 100% accurate; review demonstrates a high level of expertise and credibility with regard to personnel and use of CX methodology.</p>	<p>EPA Staff will conduct secondary reviews of work completed by the contractor. Feedback will be provided by the TOCOR</p>	<p>Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation in the category of Quality of Product or Service in the Contractor Performance Assessment Reporting System (CPARS).</p>